



Data-Driven Talent Reviews

The Talent Partner Handbook

Brought to you by the People Science team @ Mesh



Table of contents

- 1** Key actions: before, during, and after a Talent Review

- 2** Talent Review framework

- 3** Talent Review outcomes

- 4** Talent Review meeting agenda

- 5** Talent Review meeting participants

- 6** Talent Review facilitator prompts



Key actions **before** a Talent Review

DO

Prepare extensively

- Collate objective, evidence-backed data based on multiple sources and voices representative of an employee's organization network. We recommend including data that helps:
 - Capture performance in current role
 - Determine readiness for future growth
 - Consider employee aspirations and organization requirements
- Design the agenda ([sample on slide 8](#)), set ground rules, and prepare guiding questions to facilitate the discussion.
- Consider who all should participate in the review. We recommend bringing together key role holders on [slide 9](#).
- Share the collated data pack, agenda, and evaluation framework ([sample on slides 6-7](#)) with participants beforehand so they come prepared.
- Schedule multiple talent review discussions to ensure participants have sufficient time to do justice to the process. We recommend capping a 90-minute discussion to a review of 25 employees.

DON'T

Use vague criteria

- Don't allow consideration of vague criteria based on subjective judgments or undefined parameters. Ensure ratees are consistently and fairly judged using the same criteria, no matter to whom they report.

Make talent reviews a 'black box'

- Transparency is an evolutionary hallmark from a talent and succession management perspective. Share guidance with participants around how much of the process you would want to share transparently with the wider organization, and what messaging you want to communicate to the subjects of the talent reviews.

Fall into the 'one size fits all' trap

- There is no one right set of evaluation criteria for talent reviews. While designing your unique talent review framework, start with the desired end in mind. Seek inputs from leadership around critical characteristics and capabilities for your organization. Build the framework to include these and realize that this can change as the organization evolves.



Key actions during a Talent Review

DO

Set the tone

- Remind participants of the purpose, agenda, desired outputs, and their role in the discussion. Share ground rules (e.g., stick to time, challenge constructively, actively participate, and be objective).

Guide participants through a person-by-person review

- Start with employees with the highest performance ratings to set the benchmark of great performance. This will help break manager biases and keep all line managers equally engaged throughout the meeting.
- Surface data as per the included talent review framework sequentially for each employee. Challenge participants where necessary and ensure evidence-based examples are brought forward.

Be the voice of reason and encourage open dialogue

- Remain neutral and keep the conversation on track without controlling it.
- Create a safe and inclusive environment using techniques like active listening to ensure that participants feel heard and valued.

DON'T

Allow biases to influence outcomes

- Don't let subjectivity creep in - encourage participants to reflect on their own biases and challenge them during the discussion. Look for extreme manager judgments and significant variances in self vs. network scores.

Lose sight of the big picture

- Don't neglect the organization's talent and skill requirements. While determining recommendations for development plans, don't forget to align individual potential and aspirations with the company's growth and succession plans.
- It can be beneficial to use this opportunity to build your skills profile in parallel:
 - *What are the high-volume roles?*
 - *What are the most critical roles?*
 - *Which roles do we recruit most frequently?*
 - *Which roles do we struggle to recruit?*
 - *What roles do we anticipate needing in 12 -24 months' time?*
 - *What are the most critical skills for success in the function/BU?*



Key actions after a Talent Review

DO

Socialize outputs, next steps, and responsibilities

- Circulate a record of final scores and decisions in [the talent review template](#) to all participants
- Enable managers to provide team members with feedback and build individual development plans to support their specific needs and aspirations. Explain their role in their team members' continued development and outline next steps, including deadlines for development plans, follow-up meetings, and ongoing assessments, if needed.

Build an ongoing rhythm of development after the talent review

- Ensure outputs from the talent review flow into:
 - Organization-wide learning plans
 - Development 1:1s between employee and manager
 - Succession plans
 - Following performance conversation between employee and manager

DON'T

Fall into the 'set and forget' trap

- Don't forget to schedule follow-up conversations to monitor progress against development plans at timely checkpoints.
- Don't treat talent reviews as a one-and-done event. Ensure regular check-ins to ensure a steady rate of progress on developmental plans, and collect data for the next cycle of review discussions.

Lose sight of the organization's capability needs

- Don't lose track of the capabilities the organization needs to achieve business priorities. Ensure managers incorporate plans to build key skills internally while mapping individual development journeys for their team members.



Recommended Talent Review framework

Objective	Dimensions	Potential Data Sources
Stage 1: Assess performance in current role	1. Performance against shared standards of: - Goals (achievement + impact) - Key competencies: (skills + behaviors)	Performance review score % goals accomplished % stretch goals allocated* (All stars typically have more challenging stretch goals hence, performance should be discounted.) Competency score (year-round feedback / 360 feedback) % variance from current role expectations
	2. Proven growth trajectory	YoY achievement of goals YoY improvement in competencies
Stage 2: Determine future readiness	3. Unique strengths	% variance in competency score against next role expectations Management potential
	4. Achievement of career development plan	% completion of the last development plan
	5. Retention levers and risks (due to disengagement or unmet needs)	Top 3 engagement drivers Flight risk rating
	6. Individual aspiration	Expressed interest in: Manager track Deep expertise track Shift into a different career track
	7. Nominated future role	# of immediate next roles suitable for employee



Recommended Talent Review outcomes

Objective	Actions	Recommended data to record in development plan								
Stage 3: Determine talent review decision	Determine Talent Matrix categorization Determine growth recommendation	<table border="1"> <tr> <td colspan="2" data-bbox="1014 348 2448 419">Talent Matrix / NBox grid</td> </tr> <tr> <td data-bbox="1014 419 1735 575"> Coach for depth <i>Performance trend is high, and career aspiration toward functional expert track</i> >> Long-term successor for key technical role </td> <td data-bbox="1735 419 2448 575"> Coach for breadth <i>Performance trend is high, and career aspirations toward management track</i> >> Long-term successor for key leadership role </td> </tr> <tr> <td colspan="2" data-bbox="1014 575 2448 704"> Coach for high performance <i>Performance is strong and with some development could be among highest performers in the business</i> >> Promote now OR Develop as successor in next 1-2 years </td> </tr> <tr> <td colspan="2" data-bbox="1014 704 2448 832"> Coach for performance improvement <i>Development is needed to consistently improve performance and keep up with the increasing challenges of the role</i> >> Grow in current role OR Transition to the alternate role of interest at the same level </td> </tr> </table>	Talent Matrix / NBox grid		Coach for depth <i>Performance trend is high, and career aspiration toward functional expert track</i> >> Long-term successor for key technical role	Coach for breadth <i>Performance trend is high, and career aspirations toward management track</i> >> Long-term successor for key leadership role	Coach for high performance <i>Performance is strong and with some development could be among highest performers in the business</i> >> Promote now OR Develop as successor in next 1-2 years		Coach for performance improvement <i>Development is needed to consistently improve performance and keep up with the increasing challenges of the role</i> >> Grow in current role OR Transition to the alternate role of interest at the same level	
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Stage 4: Determine individual development plan	Determine next steps in conjunction with talent across: <ul style="list-style-type: none"> • Experience • Education • Exposure 	<ul style="list-style-type: none"> • Grow in current role OR Transition to the alternate role of interest at the same level <ul style="list-style-type: none"> ○ Experience: expected performance, new projects, expected achievements ○ Education: skills-based courses, training, etc. ○ Exposure: shadow senior team members on key initiatives • Promote now OR develop a successor in 1-2 years: <ul style="list-style-type: none"> ○ Experience: stretch projects, expected performance in the new role ○ Education: leadership development programs, certifications ○ Exposure: pick up cross-functional goals • Develop as a long-term successor for key technical/senior leadership role: <ul style="list-style-type: none"> ○ Experience: stretch projects, leadership initiatives ○ Education: executive education programs ○ Exposure: network with different business verticals, cross-functional goals 								

Sample Talent Review agenda

Meeting introduction <ul style="list-style-type: none">Facilitator shares the objective, ground rules, process, and evaluation framework	5 mins
Overview of business priorities <ul style="list-style-type: none">Leader shares lens of future business needs as we understand evaluation data	5 mins
Person-by-person review <ul style="list-style-type: none">Managers present evidence against evaluation framework criteriaFacilitator moderates Q&A and open discussion with other participantsFacilitator documents talent matrix categorization and growth recommendation	60 mins
Next steps and action items <ul style="list-style-type: none">The facilitator explains roles and responsibilities in the following steps: deadlines for development plans, follow-up meetings, and ongoing assessments if needed.Facilitator outlines resources available to enable managers for their role in continued talent development	5 mins
Key takeaways and wrap-up <ul style="list-style-type: none">Participants summarize new learning from the processThe facilitator concludes with things to do differently in the following talent reviewThe facilitator thanks participants for their contributions and engagement	15 mins



Recommended Talent Review participants

MUST HAVE

HR Business Partners/Talent Partners

- Bring expertise in talent management and development initiatives
- Collate relevant data sources into an information pack to be circulated among participants beforehand
- Educate participants on the process and facilitate an unbiased talent review discussion

Senior Leadership Team

- Bring insights into the organization's strategic objectives and talent capabilities needed to succeed

Direct Supervisors

- Offer objective and first-hand knowledge of day-to-day performance, behaviors, strengths, and development areas
- Take ownership of direct reports development throughout the year

GOOD TO HAVE

Succession Planning Representatives

- Identify potential successors for key roles and map risks

Learning and Development Representatives

- Offer insights into available training programs, skill-building initiatives, and growth opportunities for development journeys

People Analytics Representatives

- Provide quantitative performance data on past and present performance

DEIB Representatives / Bias Keepers

- Ensure discussions and decisions remain unbiased and equitable.

Mentors / Coaches / Sponsors, if any

- Contribute insights about employee growth, potential, and progress on development journey



Recommended Facilitator Prompts

to drive review discussions forward

While assessing performance in current role:

- "I notice that you are assigning a 5/far exceeds expectations to almost all your Direct Reports, could you give examples of how people are doing so well in this particular area?"
- "I couldn't help but notice that you have assigned a '2/meets expectations' to most of your Direct Reports, could you please explain what constitutes as low and high performance in this area?"
- "It seems like you have assigned a rating of '1/below expectations' for most of your Direct Reports, could you elaborate on why majority of your team did not do well in this area?"

While determining readiness for future roles:

- "<E mployee> has been meeting expectations satisfactorily in her current role. How do you think she fares against next role expectations? Can you share examples of such instances that can help us gain insight on her readiness for the next role?"
- "From career development conversations and 1:1s, what have we gathered on <E mployee> inclination toward general management or technical expertise? Do we have the possibility of crafting a role that allows for 25% weight for SME development?"
- "How do <E mployee> aspirations align with our expansion strategy? Is there a possibility of crafting a role that has 50% focus on customer service and 50% focus on R&D?"

While determining development journey and next steps:

- It's imperative that <E mployee> is tasked on a shadowing assignment so that he can pick up the necessary people management skills within this performance cycle. By when can we expect <E mployee> development plan to be implemented?
- "In order to prepare <E mployee> for a long-term succession of Sales and Marketing Head, how can we help <E mployee> pick up stretch projects and cross-functional goals with the Marketing department?"





Thank you

Performance enablement platform that helps your people grow.

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Schedule a complimentary consultation with us [on this link](#)

